MASTER BUY PLAN DATABASE (MBPD)
USER MANUAL
Release 3.0

National Aeronautics and
Space Administration

Headquarters
Washington, D.C.

Prepared By
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SIGN IN

To use the MBPD application, a user opens his or her web browser and types the following URL: https://extranet.hq.nasa.gov/mbpd

The first screen the user will see after typing in the URL and hitting "Return" is the Sign In screen shown in Figure 1.

Figure 1 Master Buy Plan Sign In Screen

USER NAME OR PASSWORD

All users are required to enter a User ID (also known as a Login ID) and Password. The User ID is entered first then the Password (the Password is entered by tabbing over to the field or clicking the mouse in the field labeled Password).

Each user will have his/her own password. The password can have a maximum of sixteen characters. When entering into the Password field, each character will appear in the field as * for security reasons (Figure 1).

<u>NOTE</u>: Password is case sensitive.

<u>NOTE</u>: User names and passwords are authenticated by the system validation database that contains all the MBPD users' information and privileges.

INVALID USER NAME OR PASSWORD

In the event of a typing error or outdated password, an error message displays (Figure 2). Retype valid User ID and Password and then click the Sign In button.

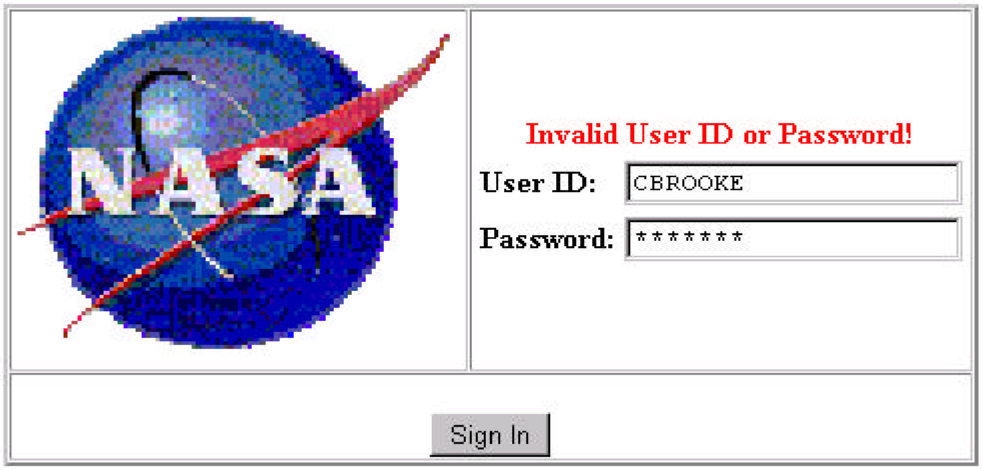

Figure 2   Invalid User Name or Password error message

<u>NOTE</u>: There is no limit on the number of password violations a user can have before entering a valid one.

MAIN MENU

Once a user successfully signs in to the MBPD, the Main Menu screen (Figure 3) will be displayed. From the Main Menu screen, the user can access the three functional components of the MBPD, or can exit from the system. Clicking on the **Exit bar** logs you out of the system and returns you to the Sign In screen (Figures 1).

<u>NOTE</u>: Only personnel designated as system administrators have access to the Security component.

Figure 3 Main Menu Screen

MASTER BUY PLAN

From the Main Menu screen, click on Master Buy Plan; the Master Buy Plan screen will appear as shown in (Figure 4).

The Master Buy Plan Database is divided into two tables. The Main table has records that have been released by the Centers for Headquarters review/approval, and records approved by Headquarters. The Pending table has records that the Centers have entered but that have not been released to Headquarters. Each Center has access to only its own records in both tables. Headquarters has access only to the Main table.

The Master Buy Plan screen provides the user with an overview listing of all records stored in the Main MBPD table. The records that appear in the list are only those for which the user has access privileges. The user's access to individual cases is governed by the viewing privileges granted by the one of the System Administrators.

ID	Center	Status	Item	FY	HS Analyst	Description
172	ARC	Open	1	2000	CE	Information and Communication Services
173	ARC	Open	2	2000	CE	Safety and Quality Assurance Services
174	ARC	Open	3	2000	CE	Contact/Grant/PO Closeout Procurement
158	ARC	Open	1	1999	HJ	Engineering & Technical Support for Life Sciences
110	ARC	Open	2	1999	CE	Information Sciences Research and Development Services
111	ARC	Complete	3	1999	CE	Rotorcraft Technology Development
1	ARC	Complete	1	1998	CE	Numerical Aerodynamic Simulation (NAS) Services (FO)

Figure 4. HQ's Master Buy Plan Screen

Click on BOF (beginning of file) to go to the first screen of records.
Click on EOF (end of file) to go to the last screen of records.
Click on Next to see the next screen of records.

Click on the ID number to see a particular record. (ID numbers are assigned automatically by the system, and have no particular meaning in themselves.)

NEW MBPD RECORD

To enter a new record, click on the Add button at the top of the Master Buy Plan screen. A data entry screen appropriate for entering information regarding a new record will be displayed as in Figure 5. The data entry fields are described in the following sections.

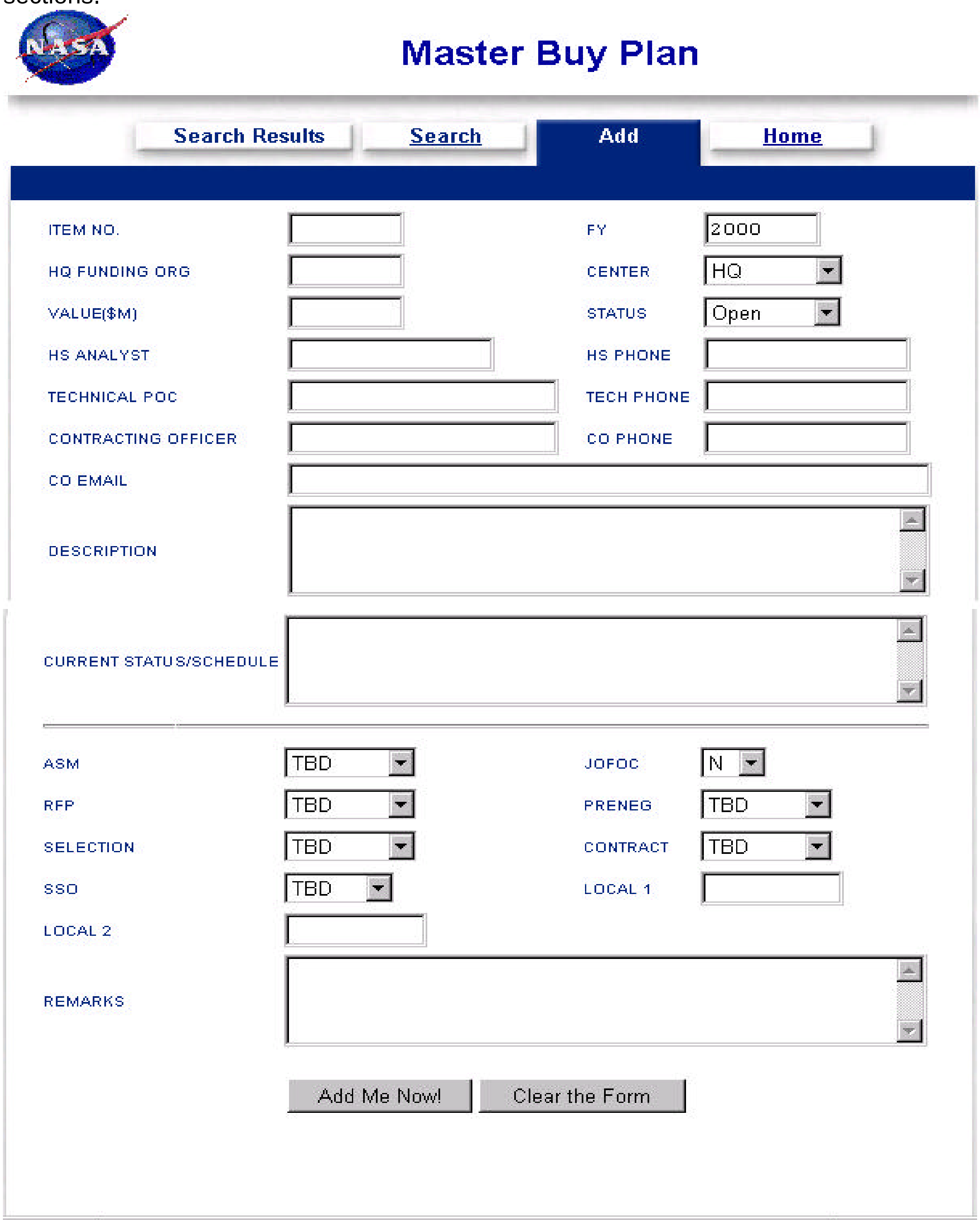

Figure 5. New Master Buy Plan Data Entry screen

ITEM NO., FY

The ITEM NO., and FY are mandatory numeric fields. The ITEM NO. field is the Master Buy Plan sequential item no. The FY field is the Fiscal Year in which the procurement action is scheduled to be initiated.

The field will reject alphanumeric characters. A dialog box will appear: "**You must enter a numeric value."** To clear the dialog box, click on the **OK** button**.** The cursor will return to the field containing the non-numeric value.

HQ FUNDING ORG, CONTRACTING OFFICER, CO EMAIL

The HQ FUNDING ORG, CONTRACTING OFFICER, and CO EMAIL are mandatory text entry fields.

The field will reject if left blank. A dialog box will appear: "**Field name can not be blanked!"** To clear the dialog box, click on the **OK** button**.** The cursor will return to the field containing the blank value.

VALUE($M)

The field VALUE is set up as a numeric field with one decimal place. This field is mandatory that allows the user to enter the estimated dollar value (in millions) of the proposed procurement action.

To add an amount to the VALUE field for a new record, type in only the numeric value (no $ sign). **Example**: For the dollar amount of $17,500,000.00, type in 17.5. If the user added no decimal point, the system will fill in .0 as a default.

CENTER

The CENTER is a mandatory field that identifies the Center responsible for proposed procurement action. It is filled in automatically.

If necessary, a Headquarters analyst can reassign an item to another Center. To select a value, click on the drop-down list arrow button next to the field and highlight a value. The drop-down list will then close, and the selected name will appear in the appropriate field.

STATUS

The STATUS is a mandatory field that is accessible via a drop down list. This field is automatically assigned the value "Open" but can be updated based on users access privileges.

To select a value, click on the drop-down list arrow button next to the field and highlight a value. The drop-down list will then close, and the selected name will appear in the appropriate field.

HS ANALYST, HS PHONE (For HQ Use Only)

The HS ANALYST and HS PHONE are text entry fields that identifies the name and phone number of the Headquarters analyst that has been assigned to that Master Buy Plan Item. This information will be filled in at Headquarters after the record has been released by the Center.

3.1.4 TECHNICAL POC, TECH PHONE

The TECHNICAL POC and TECH PHONE are text entry fields that identifies the Technical POC name and phone number that has been assigned to that Master Buy Plan Item. The user types the information in the area provided next to the labels.

DESCRIPTION

The DESCRIPTION field is a mandatory unlimited text field. Once the visible portion of the field is full, the scroll bar controls will activate to allow the user to enter or display text that extends beyond the physical size of the data entry box. The user types the information in the area provided next to the labels.

CURRENT STATUS/SCHEDULE, REMARKS

The CURRENT STATUS/SCHEDULE and REMARKS fields are unlimited text fields. Once the visible portion of the field is full, the scroll bar controls will activate to allow the user to enter or display text that extends beyond the physical size of the data entry box. The user types the information in the area provided next to the labels.

ASM, RFP, SELECTION, PRENEG, CONTRACT, SSO

The ASM, RFP, SELECTION, PRENEG, CONTRACT, SSO are fields that are accessible via a drop down list. These fields are automatically assigned the value "**TBD**" but can be updated as appropriate. Normally, the Centers will select either TBD or N/A, and Headquarters will change them when a decision has been made.

To select a value, click on the drop-down list arrow button next to the field and highlight a value. The drop-down list will then close, and the selected name will appear in the appropriate field.

JOFOC

The JOFOC are field that are accessible via a drop down list. This field is automatically assigned the value "**N**" but can be changed to "**Y**"if a JOFOC will be developed.

To select a value, click on the drop-down list arrow button next to the field and highlight a value. The drop-down list will then close, and the selected name will appear in the appropriate field.

LOCAL 1, LOCAL 2

The LOCAL 1 and LOCAL 2 are text entry fields that the Centers can use for their own purposes. The user types the information in the area provided next to the labels.

NOTE: After entering all the data, click the **Add Me Now**! button. The record will be added to the Pending Master Buy Plan Database. A dialog box will appear: “**Your submission was successful”** and the Add screen will re-appear. “Submission” in this case does not mean release to Headquarters.

If an error is made before clicking the **Add Me Now!** button the user can type over it, or can clear the entire form by clicking the **Clear the Form** button. (After a record is added, the **Clear the Form** button only clears changes made since the form was added or last updated.)

EDIT/VIEW MBPD RECORD

From the Master Buy Plan screen (Figure 4) under the **All Records** tab, clicking on the ID field of a record will produce a Detail screen as shown in (Figure 6). The Detail screen shows Master Buy Plan related information and allows the information to be both viewed and edited.

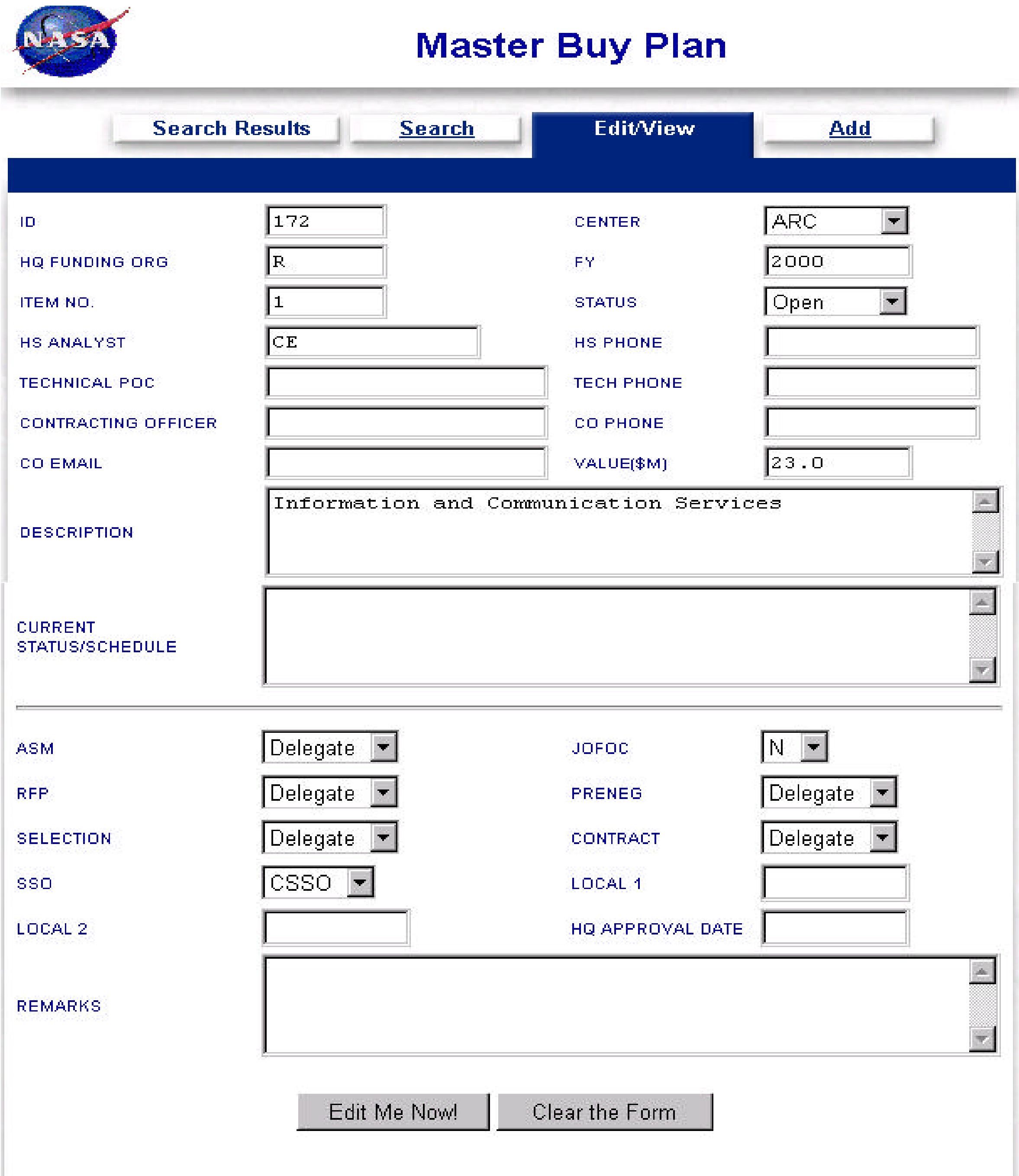

Figure 6. Edit/View screen

EDITING

If an error is made during editing, the user can either write over the error, or clear all current edits by clicking on the **Clear the Form** button, which will cause the data to revert to its previous content.

After making any desired changes, the user must click on the **Edit Me Now!** button to save the changes in the database. If a record has been released to Headquarters, this also creates an email that is automatically sent to the HS Analyst indicating that there has been a change, but it does not describe the change. The analyst will access the MBP system to view the details of the change.

When the **Edit Me Now!** button is clicked, a dialog box will appear: "**Your submission was successful"** and the All Records screen (Figure 4) will re-appear.

LIMITS ON EDITABLE FIELDS

After a record has been approved by Headquarters, the Center can only edit the CURRENT STATUS/SCHEDULE, REMARKS, DESCRIPTION, LOCAL 1, LOCAL 2, CONTRACTING OFFICER, CO PHONE, CO EMAIL, TECHNICAL POC, and TECH PHONE fields.

HQ APPROVAL DATE

This field is not visible until a record has been released to Headquarters.

The HQ APPROVAL DATE field is a date (mm/dd/yyyy). The user types in a date when the proposed procurement action has been approved.

NOTE: The HQ APPROVAL DATE field can only be modified by users with HQ Admin privilege. After entering the date the record is locked from further update. Only users with a certain privilege can delete the date and unlock the record for further updating.

RELEASE

From the Master Buy Plan screen (Figure 7), click the **Release** toolbar option.

A listing of **All Pending Records** of your Center stored in the Pending Table will appear (Figure 8).

<u>NOTE:</u> The **Release** toolbar option is visible on the Master Buy Plan Screen when the user's access privilege is Center Admin or User (Figure 7).

Figure 7. Center's Master Buy Plan Screen

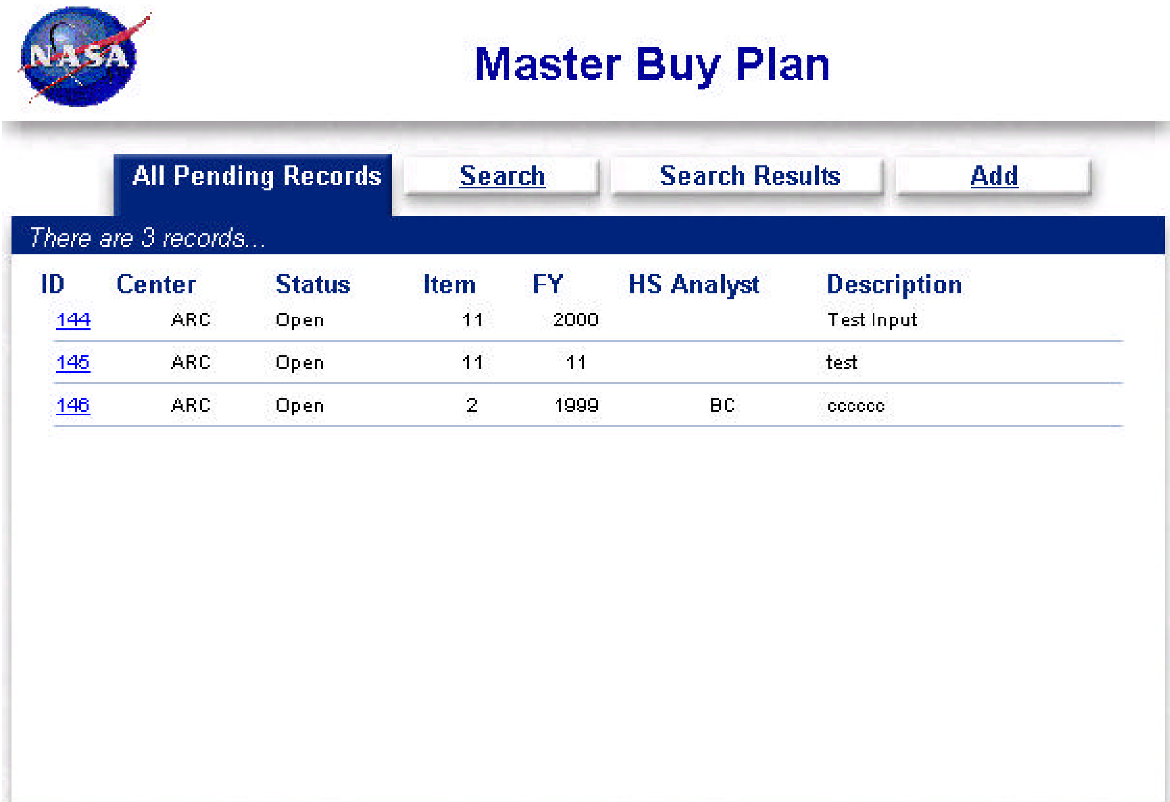

Figure 8. All Pending Records Screen

When a user with Center Admin or User access privilege adds a record, the record will be inserted into the Pending table for the Center Administrator's review. The Center Administrator can review the record and has the capability to release the record to the Main table. Only released records are visible to Headquarters. **There is an assumption that released records have been approved by the Procurement Officer or designee; therefore, records must not be released without such approval.**

EDIT/RELEASE RECORD

From the Pending Records screen (Figure 8), clicking in the ID field of a record will produce the **Edit/Release** screen as shown in Figure 9. This screen shows Master Buy Plan related information and acts as a view, edit and release screen.

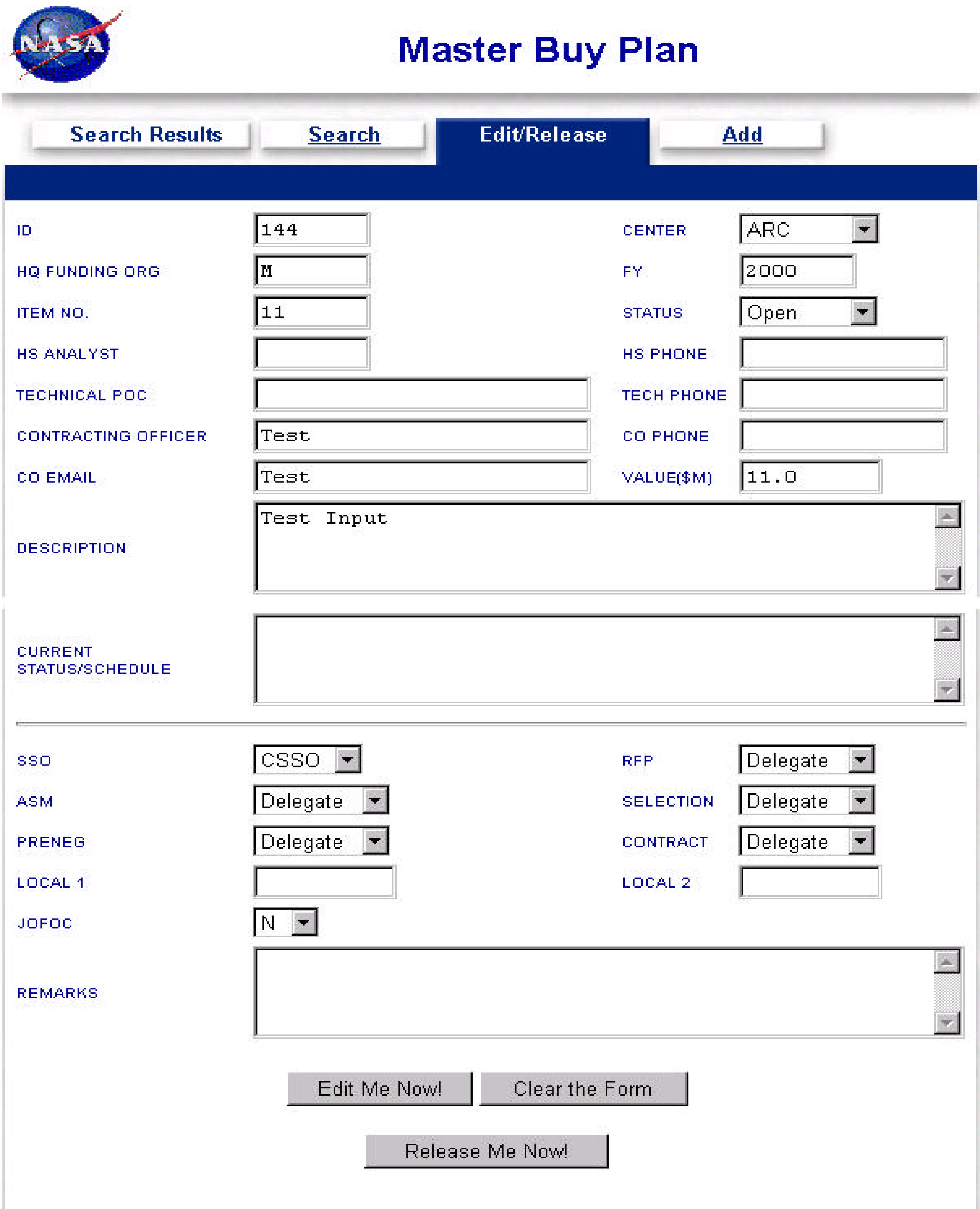

Figure 9. Edit/Release Screen

The **Edit Me Now!** button allows the User or Center Admin to edit the record before it is released to the Main table.

If an error is made during editing, the user can either write over the error, or clear all current edits by clicking on the **Clear the Form** button, which will cause the data to revert to its previous content.

After making any desired changes, the user must click on the **Edit Me Now!** button to save the changes in the database. Clicking on the **Release Me Now!** button does not transmit unsaved changes, and does not save the changes.

When the **Edit Me Now!** button is clicked, a dialog box will appear: "**Your submission was successful"**. This does not release a pending record to Headquarters.

The **Release Me Now!** button transfers a record from the Pending table to the Main table, where it can be accessed by Headquarters.

NOTE: The **Release Me Now!** button is visible under the **Edit/Release** tab (Figure 9) when the user's access privilege is Center Admin. The Center Admin has the authority to release a record to the Main table for HQ's review. **Release must not be made without the approval of the Procurement Officer or designee. Approval need not be in writing.**

SEARCH

Based on the user access privileges the MBPD provides users with two search screen options. If the user's access privilege is Center Admin or Users he/she has the option to search the Main or Pending table. Headquarters personnel cannot access the Pending table.

To perform a search of the database, select Search from the toolbar (Figure 7). The **Search Main** screen will appear as shown in (Figure 10). The screen for selecting the criteria will be displayed. The user selects specific criteria using the text box or drop-down lists provided for each field. The user can select criteria for all or none of the fields. If none of the fields are selected then all of the records are listed. To search the Pending table, click **Search Pending** (Figure 10). The **Search Pending** screen will appear as shown in (Figure 11). The screen for selecting the criteria will be displayed and the user will follow the same instruction as searching the Main table.

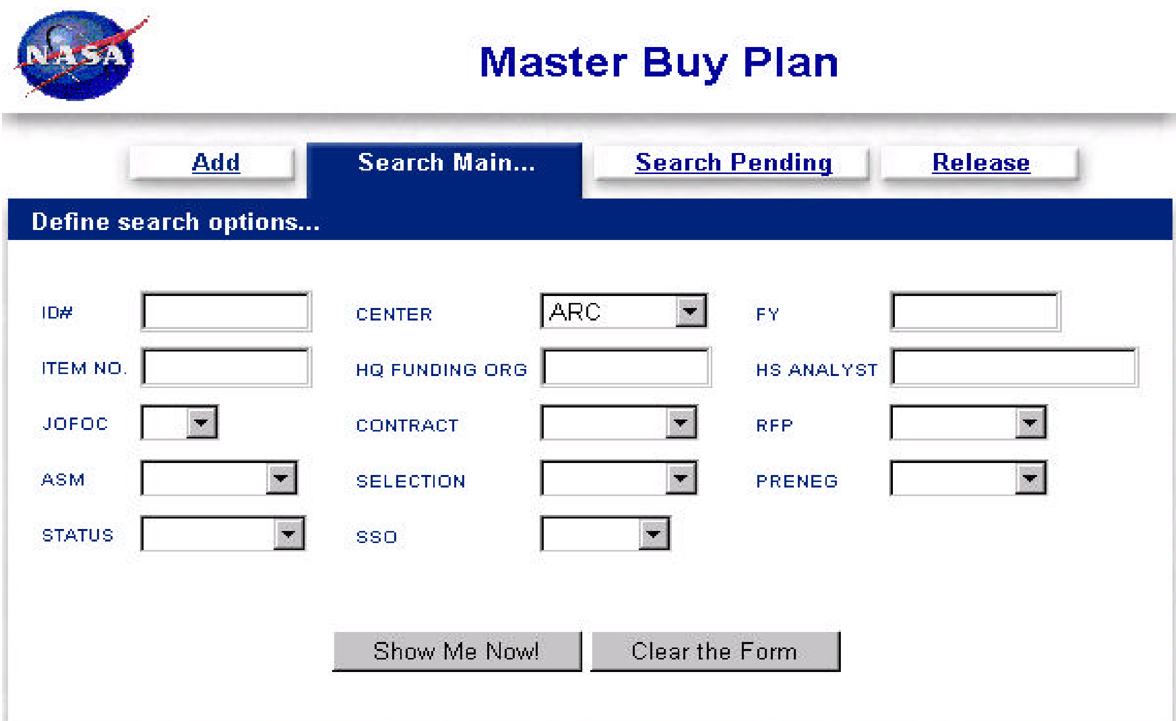

Figure 10. Search Main Screen

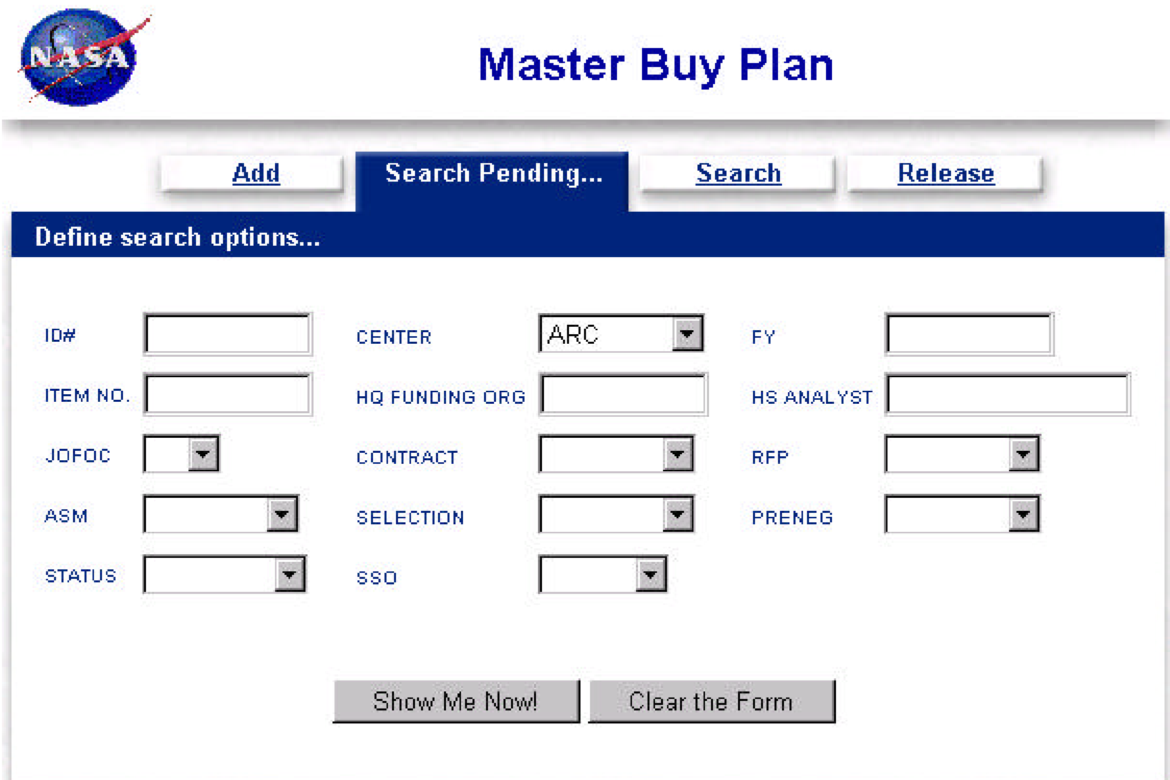

Figure 11. Search Pending Screen

REPORTS

From the Main Menu, click on the **Reports** button. Based on user access privilege the HQ Reports screen will appear (Figure 12) for HQ Admin or the Center Reports screen will appear for Center Admin and Users (Figure 15).

CENTER REPORTS

The User ID will determine the Center name displayed on the Center Reports screen (Figure 15).

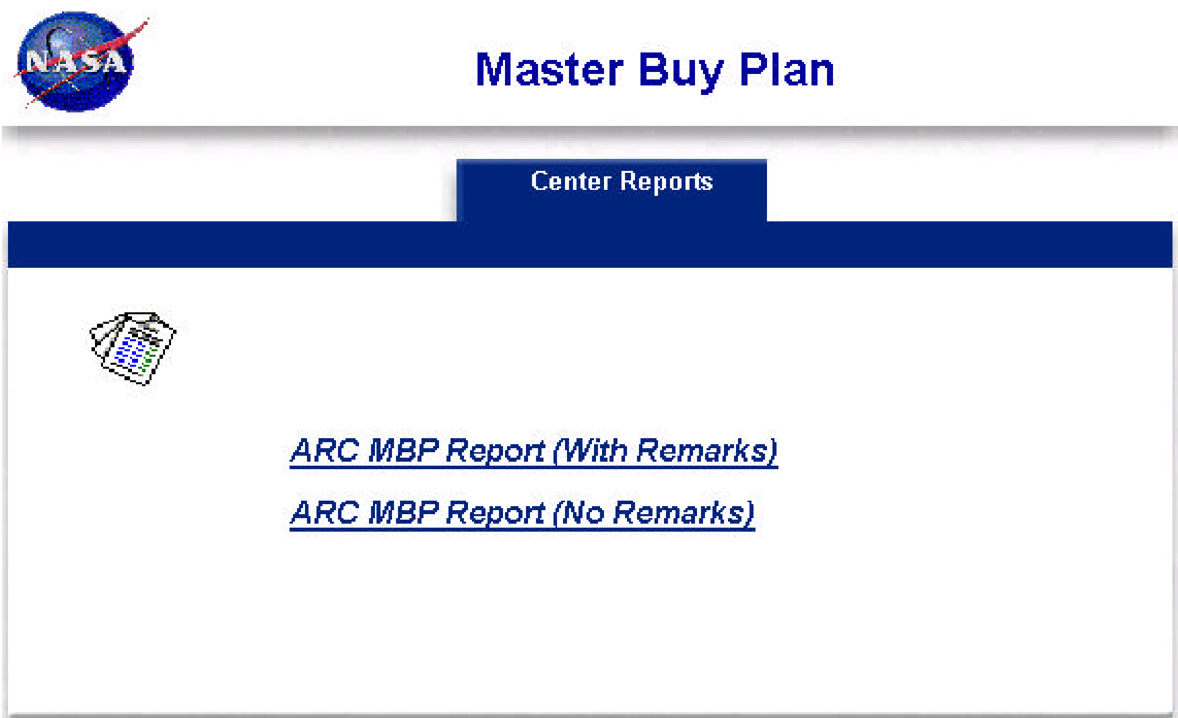

Figure 15. Center Reports Screen

CENTER MBP REPORT (WITH REMARKS)

Click ***CENTER* MBP REPORT (WITH REMARKS**) to display the Report Criteria screen. The user can select ALL or specific year for the **FY** field using the drop-down list. The user can select Yes or No for the **EXCLUDE COMPLETED ITEMS** field using the drop-down list (Figure 16). If Yes is selected only items that are Open will be displayed in the Status field (i.e., NOT complete). If No is selected all items except Open will be displayed in the Status field. The default is Yes.   After entering the criteria click on the **Get Report** button. Items that meet the criteria will be displayed in the report and is sorted by FY, and Item. The FY field is sorted in descending order. This report contains the Remarks field.

CENTER MBP REPORT (NO REMARKS)

Click ***CENTER* MBP REPORT (NO REMARKS**) to display the Report Criteria screen. The user can select ALL or specific year for the **FY** field using the drop-down list. The user can select Yes or No for the **EXCLUDE COMPLETED ITEMS** field using the drop-down list (Figure 16). If Yes is selected only items that are Open will be displayed in the Status field (i.e., NOT complete). If No is selected all items except Open will be displayed. The default is Yes. After entering the criteria click on the **Get Report** button. Items that meet the criteria will be displayed in the report and sorted by Center, FY, and Item. The FY field is sorted in descending order. This report excludes the Remarks field.

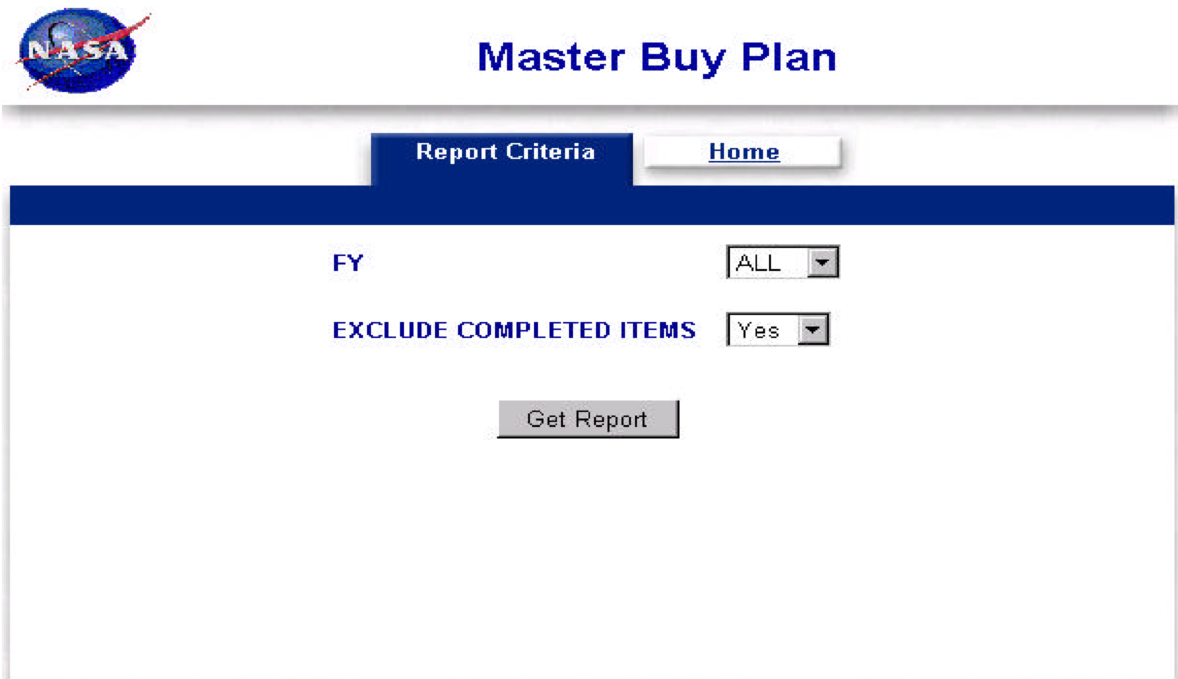

Figure 16. Center Report Criteria Screen

NOTE: The Center Admin and Users can view only their Center’s data.

HQ REPORTS

Figure 12. HQ Report Menu Screen

FIELD CENTERS REPORT (WITH REMARKS)

Click **FIELD CENTERS REPORT (WITH REMARKS**) to display the Report Criteria screen. The user can select ALL or specific criteria for the **CENTER** and **FY** fields using the drop-down list. The user can select Yes or No for the **EXCLUDE COMPLETED ITEMS** field using the drop-down list (Figure 13). If Yes is selected only items that are Open will be displayed in the Status field (i.e., NOT complete). If No is selected all items except Open will be displayed in the Status field. The default is Yes. After entering the criteria click on the **Get Report** button. Items that meet the criteria will be displayed in the report and sorted by Center, FY, and Item. The FY field is sorted in descending order. This report contains the Remarks field.

FIELD CENTERS REPORT (NO REMARKS)

Click **FIELD CENTERS REPORT (NO REMARKS**) will display the Report Criteria screen. The user can select ALL or specific criteria for the **CENTER** and **FY** fields using the drop-down list. The user can select Yes or No for the **EXCLUDE COMPLETED ITEMS** field using the drop-down list (Figure 13). If Yes is selected only items that are Open will be displayed in the Status field (i.e., NOT complete). If No is selected all items except Open will be displayed. The default is Yes. After entering the criteria click on the **Get Report** button. Items that meet the criteria will be displayed in the report and sorted by Center, FY, and Item. The FY field is sorted in descending order. This report contains the Remarks field.

HQ FUNDING ORG REPORT (WITH REMARKS)

Click **HQ FUNDING ORG REPORT (WITH REMARKS)** will display the Report Criteria screen. The user can select ALL or specific criteria for the **HQ FUNDING ORG.** The user can select ALL or a specific criteria for **FY** fields using the drop-down list. The user can select Yes or No for the **EXCLUDE COMPLETED ITEMS** field using the drop-down list (Figure 14). If Yes is selected only items that are Open will be displayed in the Status field (i.e., NOT complete). If No is selected all items except Open will be displayed. The default is Yes. After entering the criteria click on the **Get Report** button. Items that meet the criteria will be displayed in the report and sorted by Center, FY, and Item. The FY field is sorted in descending order. This report excludes the Remarks field.

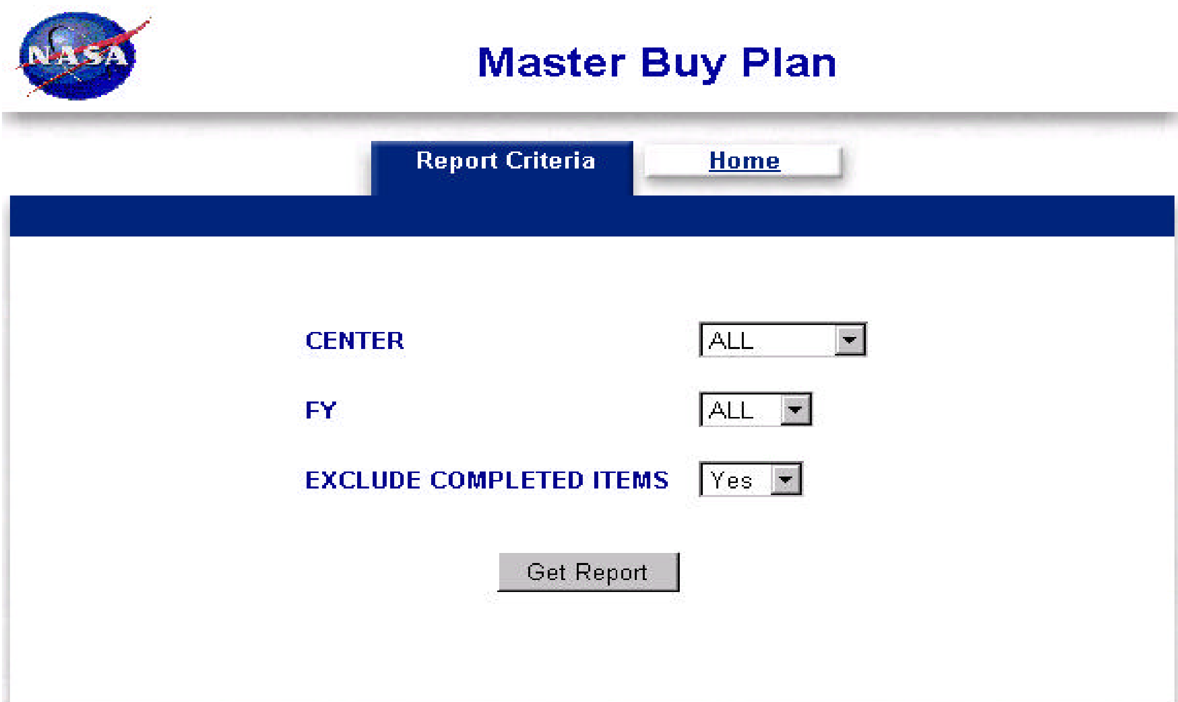

Figure 13. Report Criteria Screen

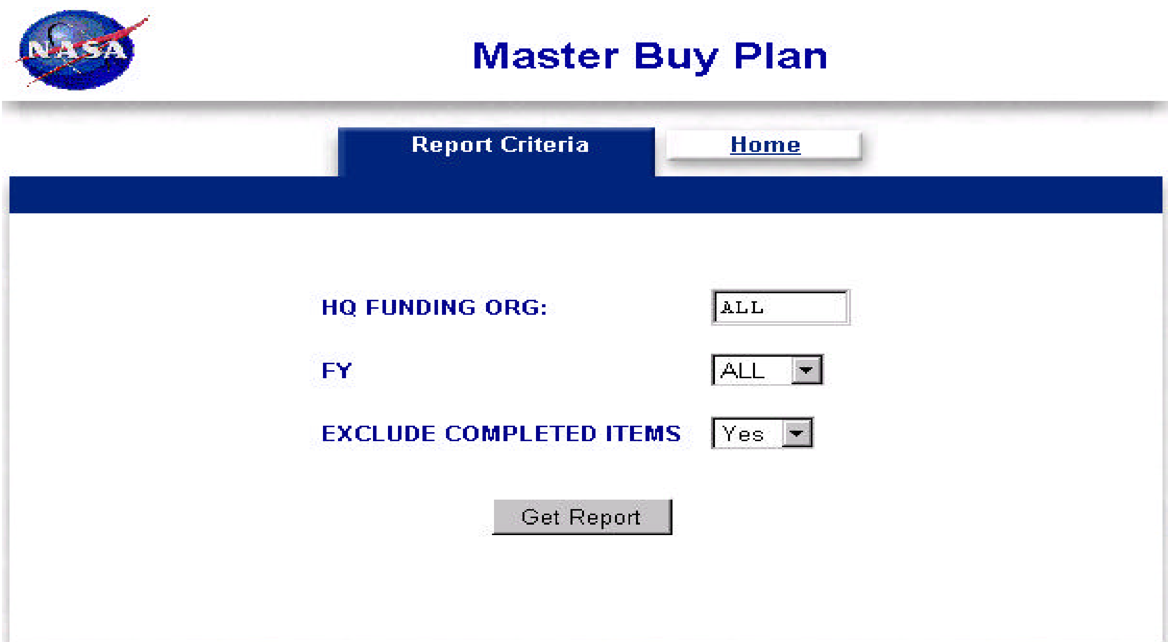

Figure 14. HQ Funding Org Report Criteria Screen

SECURITY

This function allows the Headquarters and Center Administrators to grant or deny other users access.

NOTE: The **Security** button is only visible to users with HQ Admin or Center Admin privileges.

From the Main Menu (Figure 3), click on the **Security** button.

A Headquarters Administrator will see a list of Headquarters Users, and buttons to select Centers. (Figure 17). Clicking on a Center button will reveal the users at that Center.

A Center Administrator will only see the users for the Center they are affiliated with (Figure 18).

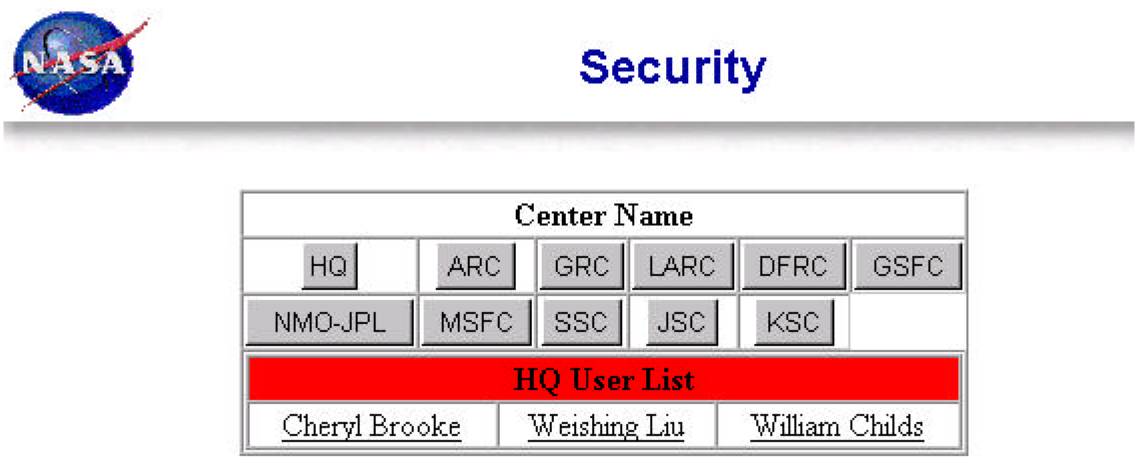

Figure 17. HQ User List Screen

Figure 18. Center User List Screen

Access to the system is restricted to members of the Procurement community. The HQ Administrator is responsible for setting up Center Administrators for each center. The Center Administrator is responsible for setting and maintaining users' information and privileges. The administrator can assign a user to one of three access levels that have different privileges. These levels are called: Users, Center Admin or HQ Admin. To display or set a user's access level, click on the user's name in the User List screen. A screen similar to the one shown in (Figure 19) will be displayed. The privileges associated with each of the three access levels are listed below.

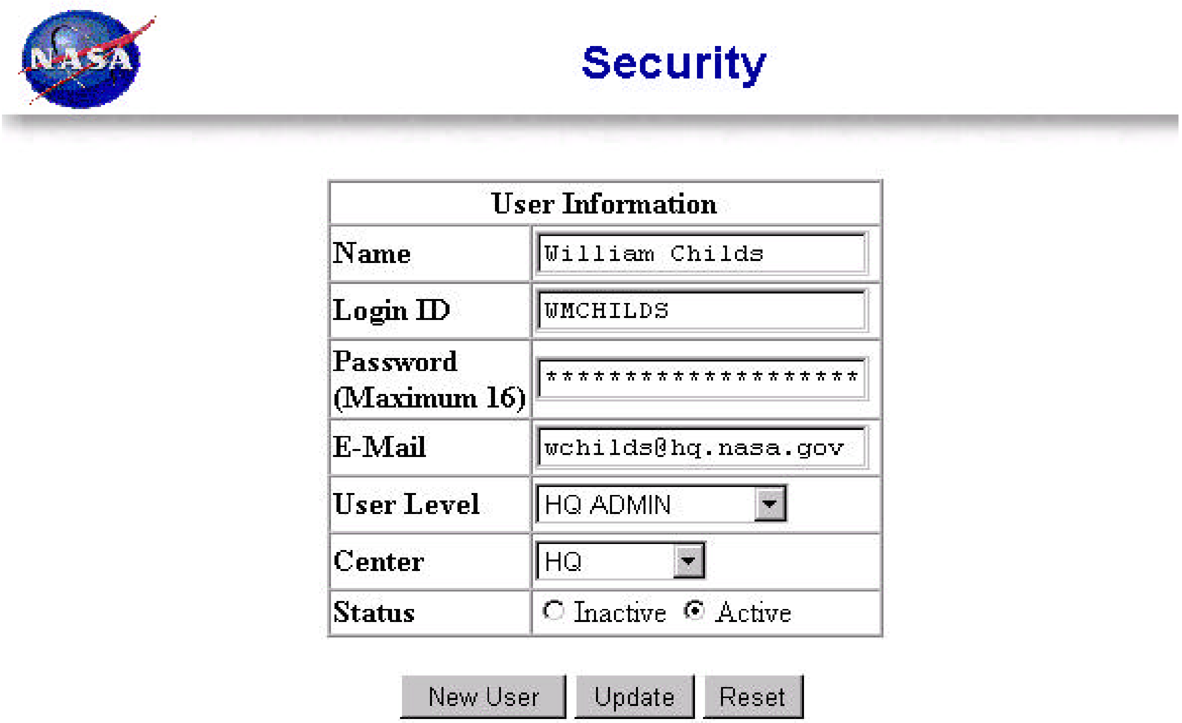

Figure 19. Screen for setting a user's access level

<u>NOTE</u>: Only one access level can be assigned to each user.

<u>USERS</u>

- This user can add a record to the Pending table.
- This user can edit records in the Pending table.
- This user can edit the DESCRIPTION, REMARKS, LOCAL 1, LOCAL2, CURRENT/STATUS SCHEDULE, CONTRACTING OFFICER, CO EMAIL, TECH POC, and TECH PHONE fields of records in the Main table.
- This user can view all records at their Center in the Main or Pending table.
- This user can search for their Center's records in the Main or Pending table.

<u>CENTER ADMIN</u>

- This user can add a record to the Pending table.
- This user can edit records in the Pending table.
- This user can release a record from the Pending table to the Main table.
- This user can edit the DESCRIPTION, REMARKS, LOCAL 1, LOCAL2, CURRENT/STATUS SCHEDULE, CONTRACTING OFFICER, CO EMAIL, TECH POC, and TECH PHONE fields of records in the Main table.
- This user can view all records at their Center in the Main table.

- This user can search for their Center's records in the Main or Pending table.
- This user can set up a new user for their Center.

HQ ADMIN – This is the highest level of access.

- This user can Add a record to the Main table.
- This user can Edit all fields.
- This user can view all records in the Main table.
- This user can search all records in the Main table.
- This user can set up a new Center Admin or Center User.
- This user can approve a record by inserting a date in the HQ Approval field.

ADDING NEW USERS

This function is only accessible by Headquarters and Center Administrators. To add a new user to the MBPD system, click on the New User button (Figure 19). A new screen will appear that contains appropriate blank fields for the Administrator to type in the information (Figure 20).

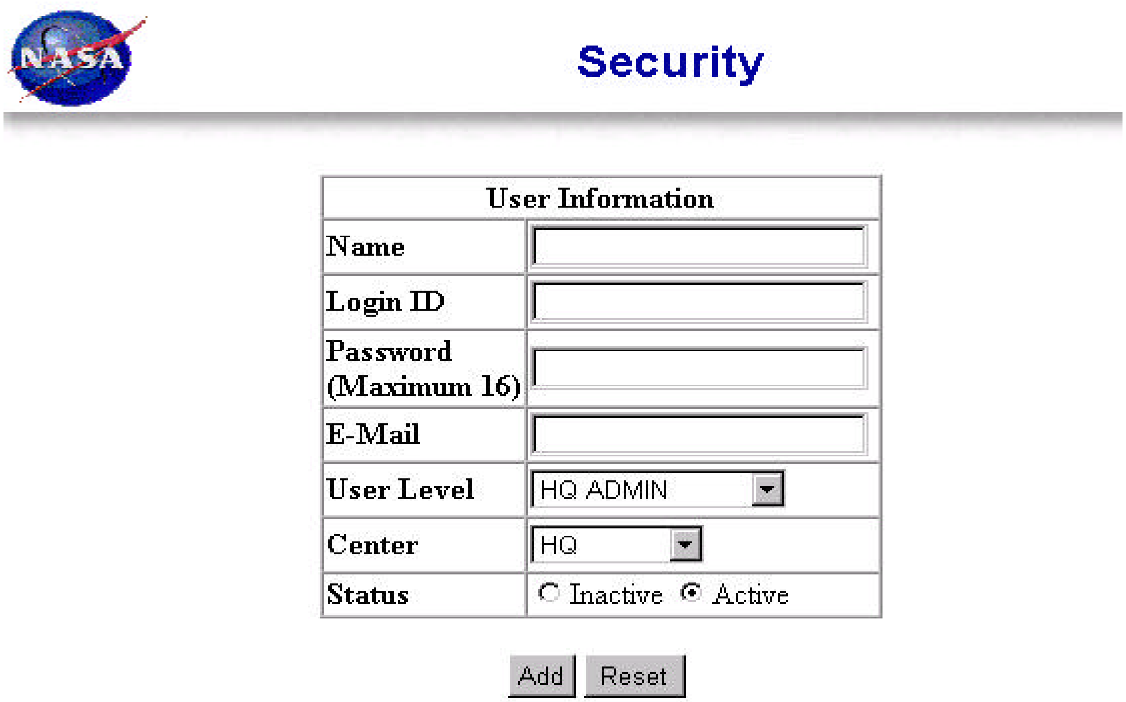

Figure 20. New User Screen

Name

Type in the user's first and last names into the Name field.

Login ID

The Login ID is also the User ID. It is a mandatory field.

The Login ID has to have exactly eight characters.

The Login ID can not contain blanks.

The Login ID is case-sensitive.

Password

The Password is a mandatory field.

The Password has a minimum of eight characters.

The Password has a maximum of sixteen characters.

The Password must use 3 of these four types of characters: uppercase, lowercase, numbers, special characters (e.g., JOHNdoe1).

The Password can not contain blanks.

The Password can not be the same as the Login ID.

Each character in the passwords will appear as a * on the screen for security reasons.

E-Mail

Type in the user's e-mail address into the E-Mail field.

User Level

Select the appropriate User Level from the drop-down list.

Center

Select the appropriate Center from the drop-down list.

Status

Select Active to give the user access to the system.

ADD Button

After all the information has been filled in, click on the **Add button** to add the user to the system.

NOTE: Once the **Add button** has been clicked, the Login ID cannot be changed. If it is updated, a new user will be generated.

UPDATING USER INFORMATION

When a user's information or access needs to be changed, click on the user's name from the User List (Figure 17 or 18). The User Information will appear (Figure 19). Type over the information to be changed, and click on the **Update button**. DO NOT change the Login ID, as this will generate a new user rather than change the current user's data.

If the user will no longer be accessing the system, change the **Status** to Inactive. This will cause the user to be rejected when trying to log in to the system.